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NATIONAL CENSUS TEST

Coverage-Related Steps and Step 9

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NATIONAL CENSUS TEST

Coverage-Related Steps and Step 9

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EXECUTIVE SUMMARY

- Generally, respondents don't have too many problems with the coverage-related steps but they feel pages 2 and 3 look very encumbered.

- The rate of change of number of people in the household before and after interviewer follow-up is very low (about 1.3 % - comparable to rate observed in the 1988 NCT)

- Follow-up to "yes" responses for Step 3 resulted in a low rate of incorrect additions but a higher rate of persons who should have been added but were not. It seems that interviewers were too cautious in this respect and that interviewer training should be enhanced regarding the situations in which persons should be added to the roster and enumerated.

- Non-responses to Step 3 were mainly "No" after follow-up.

- The main coverage problems reported in Steps 3 and 10 involved students, individuals moving around the test date and joint custody situations.

- The main negative reaction of respondents was about the obligation to give names in the household roster and question 1. Some individuals would prefer the data to be anonymous, while others were annoyed at having to write the names twice.

- The simplification of the Order of listing instruction in Step 2 didn't seem to have a significant negative impact on the order of the family members in Question 1 (only 21 out of 12447 in the LFS samples and 10 out of 2911 in the special populations sample were observed to have the spouse of person 1 listed as someone other than person 2). However, there were indications from the qualitative studies that individuals sometimes had difficulty in deciding the order of listing.

- Several respondents had problems because the response format amongst the steps was not uniform.

- Compared to the 1991 ESS, it seems that there is a tendency to a higher rate of "yes" response to the Foreign Resident Household Step in the 1993 NCT. The increased rate was found to be due to respondent or interviewer errors. These were cases in which Step 4 was checked inadvertently and the respondent (or interviewer) went on to complete the rest of the questionnaire.

- Although legitimate FR and TR households followed the instruction to not complete the questionnaire, a large number of them listed household members in the roster, raising the question of how effective the roster instructions were in excluding FRs and TRs from

partial-FR and partial-TR households.

- There were several indications that the roster instructions were often not read by the respondents, and that this may have partly been due to poor visibility due to the location below the roster and the size and depth of colour of the headings.

- The qualitative studies showed that the Step 8 instruction for households with more than 6 persons was sometimes missed or misinterpreted.

- Step 9 was the instruction which indicated that questions from 21 onwards should only be answered for persons aged 15 and over. The NCT analysis showed that for 54.2% of persons under 15 years of age, at least one question was answered after this point in the questionnaire.

I. INTRODUCTION

As part of the 1996 Census Content Determination program, an evaluation study of the coverage-related steps and instructions of the 1991 Census forms and guides is currently in progress. The term "coverage-related" refers to those steps and instructions on the Census questionnaires and in the respondent guides designed to ensure, within households receiving a questionnaire, that no eligible persons are missed and that persons not in the target population are not enumerated. Steps 3 to 7 were the coverage related steps in the 1991 Census.

Some important modifications were introduced in the 1991 Census in relation to coverage. Chiefly, the non-permanent resident population was added to the target population of the Census. Questions and instructions were adjusted accordingly. Also, a household roster (Step 5) was added at the beginning of the questionnaire as a preliminary step before the completion of question 1. Coverage instructions and clarifications concomitant with the household roster were considerably reduced compared to instructions of the 1986 Census form. Finally, the locations of other coverage-related questions common to both censuses were different in 1991.

Following the evaluation of the 1991 coverage-related questions (Briggs and Morin, 1993), some adjustments were proposed for the National Census Test of November 1993. The Household roster step was moved to the beginning of the section, immediately followed by the Persons Left Out step. As a consequence of this move, the Household exclusion steps (Foreign Resident Household and Temporary Resident Household) followed the roster steps rather than preceding them as they had in 1991. The "who to include" instructions were made more comprehensive, particularly for the foreign and the non-permanent residents, and the listing order instructions were simplified. Other minor changes were made in the wording of the other steps.

This study also includes an evaluation of Step 10 of the 1991 Census questionnaire which screens out children under 15 before the mobility questions. An evaluation of the alternative version implemented in the NCT (step 9) is also given in this report.

The purpose of the current study is to evaluate the alternatives tested in the NCT. In section II, a definition of the Census target population is given. Section III describes the coverage-related questions and instructions used in the 1991 Census and summarizes the evaluation of Briggs and Morin (1993). The alternatives for the coverage questions tested in the 1993 NCT are presented and evaluated in section IV while section V deals with the skip-pattern instruction used for children under 15 years old (Step 10 in the 1991 Census). The 1991 and 1993 versions of the coverage-related steps are presented in Appendices A and B for reference.

II. 1991 CENSUS COVERAGE.

The Canadian Census is a modified *de jure* census. The *de jure* approach to census taking enumerates persons who belong to the target population at their usual place of residence in Canada regardless of where they are at the time of the Census. The Canadian approach is "*de jure* modified" because of overseas enumeration and enumeration of temporary residents (for coverage evaluation and correction purposes).

The next paragraphs define the two key concepts of the previous definition, the target population and the usual place of residence, of which all coverage-related questions and instructions of the Census are an operational translation. This definition was used for the 1991 Census and is unlikely to change for the 1996 Census.

A. Target Population of the 1991 Census.

The first condition to meet to be part of the target population of the Census is to be born and still alive before Census day. Then, the following categories applied:

1. Persons Living in Canada on Census Day.

Included in the Target Population:

1.1. Canadian Residents.

1.1.1. Non-Immigrant Population.

Non-immigrants refers to persons who are Canadian citizens by birth.

1.1.2. Immigrant Population.

Immigrant population refers to persons who are Canadian citizens by naturalization or to persons who are landed immigrants in Canada.

A landed immigrant is a person who has received lawful permission to come to Canada to establish permanent residence. Application for landed immigrant status may be made either outside Canada through Canadian embassies or consulates, or made by people who are in Canada on temporary work, visitor, or student visas. Any person who has obtained landed immigrant status is eligible to become a Canadian citizen providing that he/she meets the additional requirements found in the Citizenship Act such as length of residence in Canada (3 years), lack of deportation order, etc. They are included in the census providing that their usual place of residence is within Canada.

1.2. Non-Permanent Residents.

1.2.1. Persons Who Are Not Canadian Residents but Hold One of the Following Visas:

- Student Authorization
- Employment Authorization
- Minister's Permit

1.2.2. Refugee Claimant

A person in Canada whose application for Convention refugee status (considered to be equivalent to landed immigrant status) has not yet been processed; he/she may have been given a temporary visa (work, student or visitor).

Not Included in the Target Population:

1.3. Foreign Residents

1.3.1. Government representatives of other countries and their families who are not part of the target population of the Census attached to the legation, embassy or other diplomatic body of that country.

1.3.2. Members of the Armed Forces of other countries stationed in Canada and members of their families who are not part of the target population of the Census.

1.3.3. Residents of other countries visiting Canada temporarily.

2. Persons Living Outside Canada on Census Day.

Included in the Target Population:

All Canadians citizens or landed immigrants who usually reside in Canada and who are temporarily absent from Canada on Census day. These include:

2.1. Government employees stationed outside of Canada and their families

2.2. Members of Canadian Armed Forces stationed outside Canada and their families.

2.3. Crews of Canadian merchant vessels.

B. Usual Place of Residence.

Since the Census uses a *de jure* approach, all persons who belong to the target population should be enumerated at their usual place of residence.

Most people have one residence where they live most of the year. Consequently, the concept of "usual residence", even if not defined on the Census questionnaire or the Guide, is clear enough not to generate in general any ambiguity in the response process.

However, there is a non-negligible portion of people in Canada who are in a different situation. First, there are persons who don't have, as such, a usual residence. According to the Census procedures, they should be enumerated according to a *de facto* approach in the dwelling where they stay on Census day.

And second, there are persons who have more than one dwelling that could be considered by them as their "usual residence". The identification of the usual residence according to the Census framework depends then on the particular situation of the person. The possible cases can be classified into three main categories as follows.

1. Persons With More Than One Residence for Work-Related Reasons.

The persons considered here are those who stay at one residence while working and return to another home at regular intervals. They are further divided into two groups:

> First, there are married persons or common-law partners who live away from their family while working, but who return to their family regularly (such as weekends). In this case, the usual residence is the home they share with their family.
>
> The other case is the unmarried person who has one place of residence while working but who returns to another residence regularly (for example, a parent's home). In this case, the usual place of residence is the dwelling he/she lives in most of the time.

2. Persons With More Than One Residence for Studies-Related Reasons.

This group refers to students that have a secondary residence near the school they are currently attending. In the 1986 Census, the criterion to decide which is the usual home was financial independence. Unmarried postsecondary students temporarily away at school, college or university, or on summer jobs, and not financially independent were to be enumerated at their parents' residence. Those who were financially independent were to be enumerated at their own usual place of residence. All primary or secondary school students automatically fell into the first category.

Because "financial independence" can be a difficult concept to define, the decision criterion was simplified for the 1991 Census and excluded any specific reference to this concept. As a result, unmarried postsecondary students temporarily away at school were to be enumerated at their parents' residence.

3. Persons With More Than One Residence for Reasons of Recreation or Lifestyle.

This category regrouped all the other people living in more than one residence. Included are, for instance, people who have a seasonal dwelling such as a vacation home, and children in a joint custody situation who regularly alternate between living at their father's and mother's residences. In these cases, the criterion to define the usual residence is the place where the person spends the largest part of the year. If time spent at each residence is about equal, the residence where the child stayed on census day should be considered the usual residence.

To this last category could be added the special case of people living in an institution (hospital, senior's home, jail, etc.) on Census day. If they have lived away from the dwelling for 6 months or more, the institution should be considered their usual residence. Otherwise, they should be enumerated in the dwelling.

III. 1991 CENSUS COVERAGE-RELATED STEPS AND INSTRUCTIONS

Introduction

The coverage-related steps on the Census Questionnaire are in theory designed to ensure that everyone in the Census target population is enumerated once, and that persons not in the target population are not enumerated. Here we refer to coverage of individuals within those households which receive questionnaires, and not to that aspect of coverage related to entirely missed households.

This section of the report will provide a description and a summary evaluation of each of the 1991 Census coverage-related steps. The changes which were implemented in the 1993 NCT as a result of the 1991 evaluation are described in section IV. The details of the 1991 evaluation can be found in the report of Briggs and Morin (1993) in which they present the results of a study in which questionnaires from the 1991 Edit Sample Study were examined in order to assess the coverage related steps. Their report also drew on the results of the 1991 Reverse Record Check and 1991 Overcoverage Study.

The coverage steps on the 1991 Census questionnaire were Steps 3-7, and are presented in Appendix A for reference. The step numbers used in this section correspond to the 1991 numbers, and the steps are considered in the order in which they appeared on the 1991 Census Questionnaire. Steps 3 and 4 were screening steps used to identify households which were not to be enumerated in the Census. Step 3 was to be checked if all household members were Foreign Residents. If all household members were temporary residents with usual homes elsewhere in Canada, the total number of persons was to be entered as a response to step 4. Step 5 was the Household Roster, in which all of the usual residents of the household were to be listed. Step 6 was the prompt for Persons Left Out, to have the respondent identify persons that he/she had decided not to list in the roster. Step 7 asked for the Number of Temporary Residents, ie. those who were at this dwelling at the time of the Census but had a usual place of residence elsewhere in Canada. These steps along with their edit and follow-up procedures are described in more detail as follows:

Step 3 (1991) - Foreign Resident Household

Step 3 was designed to identify those households comprised entirely of Foreign Residents. The respondent was instructed to mark the circle in Step 3 if all household members were Foreign Residents (FRs). The people in these households were not to be enumerated and the respondent was instructed to return the questionnaire without answering any further questions. If Step 3 had been checked by the respondent, the CR was instructed to follow-up by telephone to ensure that

the household was in fact made up entirely of FRs. If not all of the members of a household were FRs, the CR was instructed to enumerate only the non-FRs. If there was no response to Step 3 or Step 4, then CR follow-up was to be carried out only if there was no entry in question 1.

Evaluation of 1991 Census FR Household Step

The results from the analyses showed considerable confusion among the respondents concerning whether or not they were Foreign Residents, Non-Permanent Residents, or even Landed Immigrants. Part of this confusion seemed to be caused by the questionnaire's handling of these types of respondents.

The term "Foreign Resident" was used in this step before any definition was given, although a "see below" note was indicated. The instruction to not complete the questionnaire and to mail it back was given before the definition of a Foreign Resident. There was no definition of Non-Permanent Residents (NPRs), nor any indication that these individuals were to be enumerated and not considered to be FRs. Considering the high undercoverage rate of NPRs, this method of dealing with FRs represents a large coverage risk.

To complicate this further, the Census Guide entry for Step 3 was misleading. The question justification for Step 3 stated (incorrectly) that "only Canadian residents are included in the Census", even though the instruction underneath contradicted this statement. It should also be noted that Step 3 would only handle the case of a household comprised entirely of FRs, and not the case of some FRs living in a household with some Non-FRs. There were no specific instructions in the coverage steps of the questionnaire concerning mixed FR/Non-FR households, so the respondent was not informed that the FRs were not to be enumerated. Further, if mistakenly enumerated, there was no way that a Foreign Resident could be identified. There was no criterion to distinguish between a questionnaire correctly completed by a Non-Permanent Resident and a questionnaire incorrectly completed by a Foreign Resident.

Step 4 (1991) - Temporary Resident Household

Step 4 was designed to identify those households comprised entirely of Temporary Residents. Respondents are asked to enter the number of Temporary Residents (TRs) in the box in Step 4, but only if the household is entirely made up of TRs. The respondent is then instructed to return the questionnaire without completing the rest of the questions.

If step 4 had been checked by the respondent, the CR was instructed to follow-up by telephone to ensure that the household was in fact entirely made up of temporary residents, and to verify the number of these. The CR was then instructed to follow-up in order to complete a Form 3 for each temporary resident. If neither step 3 nor step 4 was checked, then follow-up was to be done only if there was no entry in question 1.

Evaluation of 1991 TR Household Step

As in Step 3 for Foreign Residents, the analyses of Step 4 show that there is a misunderstanding of the concept of Temporary Resident. A notable proportion of questionnaires received by mail as Temporary Resident Households were determined to not be such after follow-up. Sometimes a household with some temporary residents was reported as a complete temporary resident household. Again, there is a risk of incorrectly excluding an entire household at this step if the respondent does not understand the wording of the step. In this case, the statement "if all persons in this household are staying here temporarily and have a usual home somewhere else in Canada" is expected to be sufficient. The Census Guide does provide the respondent with more information, but we cannot assume that the respondent will necessarily consult the Guide in case of doubt.

This seems to be a dangerous approach given the complexity of the concept of a "Usual Resident", and the empirical evidence from the Edit Sample Study (ESS) and the Reverse Record Check (RRC) studies of coverage errors related to this particular aspect of coverage.

Step 5 (1991) - Household Roster

The Household Roster asks the respondent to provide a list of the members of the household, with some reminders of which people should be included, and some instructions describing the order in which the persons should be listed. The instructions given with the 1991 Census version of the roster combined the concepts of "order of listing" and "whom to include". The respondent was given fairly explicit instructions about beginning the list with certain individuals, continuing with other specific categories of persons. A third list of instructions, entitled "Be Sure to Include", listed particular cases which the respondent might have doubts about.

If the number of persons listed in the household roster was equal to the number of persons listed in Question 1, then no follow-up was required by the CR. If a person was listed in Question 1 but not on the roster, the CR was instructed to add the name to the roster. If a person was listed on the roster but not in Question 1, the CR was to enter the name in Question 1 and follow-up for that person. If more persons were indicated in the column "Number of Usual Residents" in the VR than were listed in Question 1, then the questionnaire was to be marked for follow-up.

Evaluation of the 1991 Household Roster

The definitions of the target population and of the usual residence for the Census of Canada, as given in Section II, are conceptually complex compared to the coverage definition of other countries (see, for example, the case of the United States). Analyses of problems reported in Step 6 and results from the coverage studies of the Census (the Reverse Record Check and the Overcoverage Study) show that this complexity has an important impact on the quality of the coverage as about half of the undercoverage is due to missing individuals in covered households. More frequent cases reported include students living away while at school, persons living in an institution, children in joint custody situations, people moving around Census day and non-permanent residents.

In this context, it appears that the minimalist approach used in the 1991 Census to define "usual place of residence" is inadequate. The "definition" given to respondents in Step 5 provides mainly a list of exceptional cases, and some of these are vague, if not misleading regarding information provided. For example, the second item in the "BE SURE TO INCLUDE" instruction states "anyone temporarily away on June 4, including students away at school, or a husband, wife, or others working away from home". In the case of students, this represents a poor translation of the Census coverage definition related to students. The term "temporarily" is used imprecisely. If a student is away for most of the year, the respondent for the household may decide that "temporarily" does not apply to the student, even though the student should almost always be included.

Two special cases concerning whom to include on the questionnaire appear only in the Guide:

newborns and children in joint custody situations. Notwithstanding the fact that important segments of the coverage definition should not be relegated to the Guide, the explanation of what to do in a joint custody situation is unsatisfactory. The only guideline to the respondent is "if parents have joint custody of their children, only one parent should include the children on his or her list". This is not really an instruction about the household where the children should be enumerated, but a restriction. Parents cannot be expected to contact each other to determine which parent should include the children on his or her Census form. Clearly the rule should be stated more explicitly.

Other cases are not considered at all. The cases of the FRs and NPRs have been mentioned above, but there is also nothing on the questionnaire about people who live in a seasonal dwelling for a significant portion of the year, people who move around Census day, or deaths on or just after Census Day.

Step 6 (1991) - Persons Left Out

Step 6 asks the respondent to list anyone that they did not include in the roster, but felt that there was a possibility that this person should be enumerated there. It also asks for the reason that the person was not included, to help the CR determine whether or not the person should be enumerated.

If there was no response to Step 6, or if a name was listed but without a reason, then the CR is instructed to mark this Step for follow-up. If the step was answered "yes", or if a name and reason was given, the CR should refer to the "whom to include" rules and then determine whether or not the person should be included. If the person should be included, then the step should be marked for follow-up.

Evaluation of 1991 "Persons Left Out" Step

The main result from the analyses of Step 6 shows that most of the follow-up was due to non-response and that, after follow-up, more than 98% of these questionnaires either still did not respond or answered "NO" at phase 2. This strongly suggests that follow-up of non-response to Step 6 is not very useful in terms of coverage.

As reported above, questionnaires with "YES" in this section give a good picture of the kind of coverage difficulties experienced by the respondents. The most frequent reason for leaving a person out is if the person is a student away at school. Other common reasons are persons in an institution (hospitals, nursing homes, rehabilitation centres, jail, etc.); persons moving around Census day, or having a house built or renovated; people living at two different residences, one while they are working, and another while they are off; and children left out because of couples that were separated or split, each with joint custody of the children.

IV. 1993 NATIONAL CENSUS TEST COVERAGE-RELATED STEPS AND INSTRUCTIONS

Introduction

The evaluation of the 1991 Census coverage-related steps and instructions resulted in a modification of these steps and instructions for the 1993 NCT. The resulting 1993 version is presented in Appendix B. For the most part, the changes followed the recommendations given by Briggs and Morin (1993). These changes which involve the order of the steps, the instructions for each step, and the rules for edit and follow-up, are described and evaluated in the following sections. The evaluation is done with a view to the following three aspects of the coverage issue:

1 - The observed response distribution is presented for each of the steps and wherever possible is compared to historical data.

2 - Within a household, were all eligible persons enumerated and all ineligible persons excluded?

3 - Did the respondents understand and comply with instructions?

Besides the quantitative analysis of the coverage related steps, qualitative information for the evaluation has been drawn from several other NCT reports, listed below for reference. An overview of the new version of the coverage related steps is given in the following section, followed by an evaluation of each of the steps.

Report No. 3: **National Census Test Questionnaire Design Consultation**, Bambrick, R. and Joyce, B., (January 1994).

Report No. 4: **1996 National Census Test Evaluation of the Census Help Line**, Neumann, A., Carpentier, M. and St. Jean, C., Operations and Integration Division, (March 1994).

Report No. 5: **National Census Test Interviewer Debriefing Report**, Allan, C. et al, (April 1994)

Report No. 6: **Evaluation of Field Collection Procedures**, Taller, A., Census Collection Section, (May 1994).

Report No. 15: **1996 National Census Test Evaluation of Questions 12 to 15 (Place of Birth, Citizenship & Immigration Questions) - Preliminary Draft**, Badets, J., (June 1994).

Report No. 25: **Respondents' Comments on the NCT Questionnaire - Preliminary Analysis**, L. McKeown (May 1994).

Cognitive Research: **Design and Layout of the 1996 Census Questionnaires - Observation Report of the Toronto and Ottawa Interviews Conducted in English, February 1 to February 21, 1994**, Statistics Canada, Census Operations Division, Communications Division and Questionnaire Design Resource Centre, (February 1994).

Overview of Changes Made for the 1993 NCT

Changes in the Order of the Steps:

Table 1 shows the order of the coverage-related steps on the 1993 NCT and on the 1991 Census. For comparison the corresponding step numbers for the 1988 NCT and the 1986 Census are also given.

Table 1 Order of the Coverage Related Steps in the 1993 NCT and on Previous Questionnaires

Step	1993 NCT	1991 Census	1988 NCT	1986 Census
Roster	Step 2	Step 5	Step 2	---
Persons Left Out	Step 3	Step 6	Step 4	Quest. 8(c)
Foreign Resident Household	Step 4	Step 3	Derived (Q4)	Cover
# of Temporary Residents	Step 5	Step 7	Step 3	Quest. 8(d)
Temporary Res. Household	Step 6	Step 4	Derived (Q4)	Cover

It was decided to put the 1993 NCT household roster at the beginning of the coverage section rather than later in the coverage related steps as in 1991. This was an attempt to have the respondents make their first decision on whom to include based on the instructions found in the roster, rather than based on the FR and TR household steps. If the respondent misunderstood either of these steps, this could result in the respondent not even reading the rest of the steps/questions. Also, using this method, a list of household members is obtained at the beginning of the questionnaire, which is helpful if follow-up is required.

The Persons Left Out step remained immediately following the roster as it did in the 1991 Census.

In the 1993 NCT the FR step was moved to a position located after the household roster and the Persons Left Out step. It was felt that this might result in fewer misclassifications of FRs because respondents would make their first decision on whom to include based on the instructions in the roster, rather than on those in the FR step.

The TR step was moved to a position located after the FR household step, which as indicated

above followed the Persons Left Out step. The reasons were essentially the same as those for the move of the FR household step. Also, the TR household step was put into a skip pattern with step 5 (Number of Temporary Residents). The respondent was instructed to skip Step 6 if "none" had been checked in step 5.

Changes in the Step Instructions:

In the 1993 version of the roster, the instructions for order of listing were simplified considerably and were separated from the lists of instructions about who should and should not be listed. The "order of listing" instruction was placed above the roster, along with a new instruction **"Don't forget to include yourself!"**. The lists of those household members to be included and excluded were given below the roster under the headings **"Include"** and **"Do not include"** which were bolded in coloured ink (rather than black).

The "Do not include" instruction was completely new, added specifically to indicate that FR's should not be listed on the roster. This was in contrast to the 1991 version in which no indication was given that FR's should be excluded from the roster. The definition of FR's rather that the term "foreign residents" was used, in order to avoid potentially confusing terminology.

The emphasis of the "Include" instructions was changed considerably from the 1991 version. A new instruction was added to indicate that non-permanent residents should be enumerated, although the term non-permanent resident was avoided. All of the first seven 1991 instructions were replaced by the new "order of listing" instruction and by one instruction to include "Everyone who usually lives here, including family members, room-mates, boarders and live-in employees." A more comprehensive instruction was given for "Unmarried sons or daughters who are students ...", while the instruction regarding "a husband, wife or others working away from home" was removed from the list. Specific instructions were added for the enumeration of children in joint custody situations. The instructions regarding persons away in an institution and persons with no usual home elsewhere who stayed there on Census day were essentially the same as in 1991, with slight changes in wording.

The 1993 roster instructions were intended to help the respondent understand the concept of the "usual" place of residence. The changes made reflected the areas of respondent difficulty which were identified in the evaluation of the 1991 Census. Instructions concerning the more numerous of the special situations, instructions that resolve causes of persons being left off the roster in the 1991 Census, and instructions that deal with the cases in which undercoverage is high were kept on the NCT questionnaire. The more detailed instructions were located in the guide, in order to avoid overloading the respondent with details to read. It was felt that if there was too much to read, the respondent might not read any of it.

The instructions for the Persons Left Out step were not changed from the 1991 version.

With regard to the Foreign Resident Household step, one change made for the NCT was to remove the term "foreign resident" from the instructions and to simply to include its definition. The term "foreign resident" had been found to cause confusion amongst respondents, especially those not born in Canada (non-permanent residents and landed immigrants). The instructions given in the FR step were presented in point form because focus group testing indicated that most respondents preferred this format to paragraph format. And as indicated above, the roster instructions also indicated that FR's should not be included in the roster.

In terms of the Temporary Resident Household step instructions, the respondent was instructed to skip step 6 if the response to step 5 (Number of Temporary Residents) was "none". Also, the wording was changed to avoid the use of the work "overnight" which had raised objections from a few respondents, but was otherwise similar to the 1991 version. The respondent was expected to infer that temporary residents were not to be listed on the roster because this was not their "usual" home.

Step 8 contained the instruction to copy the names from the roster into question 1 and to continue with the questionnaire, along with a note indicating the procedure to follow in the case in which there were more than 6 persons in the household. The instructions for this step were not changed from the 1991 version (step 9 in 1991).

Changes in the Rules for Edit and Follow-up:

The 1993 NCT rules for edit and follow-up of the coverage related steps were essentially unchanged from the 1991 rules, except for the case of non-response to step 3. The edit and follow-up rule for non-response to the Persons Left Out step was changed from mandatory to non-mandatory. That is, a non-response to this step could lead to follow-up via the "rule of six" but would not result in mandatory follow-up on its own. This change was due to the finding that the 1991 mandatory follow-up for non-response resulted in a very low improvement in coverage for the effort expended. A "yes" response would still result in mandatory follow-up if the reported reason indicated that the individual should have been enumerated, or if no reason was given.

General Impressions of the Coverage Related Steps

Feedback regarding the overall impression of the coverage related steps was obtained from Forms Design Specialists external to Statistics Canada, from interviewers via debriefing and from the respondents themselves via step 10 of the NCT.

The reaction of the Forms Design Specialists to the coverage related steps was generally positive. These experts, consulted as part of the questionnaire design process, indicated that the steps were easy to follow, except for one comment that the instructions on "Whom to include and not include should precede the list of names". They agreed that the graphic symbol helps to highlight the steps and gave a few suggestions for improving the visibility of the step labels (Bambrick and Joyce, 1994).

The interviewer debriefing however, revealed that the interviewers found these two pages to be imposing due to the amount of information presented there. This tended to put respondents off and was important particularly when the questionnaire had to be completed by telephone follow-up. A debriefing questionnaire was also filled out by interviewers. The results regarding the coverage related steps are presented in Table 2.

Table 2 Results of Interviewer Debriefing Questionnaire Regarding Coverage Related Steps

NCT Interviewer Debriefing Questionnaire Questions 10 - 14, Regarding Coverage-Related Steps 2 - 6	YES	NO
10. In general, did respondents have difficulties distinguishing between the usual and temporary residents of their dwelling?	32	222
11. Were there any situations where it was unclear to you or the respondent as to whether a person should be included as a usual resident of the dwelling?	58	195
12. Were there any terms in this section that were not well understood by respondents?	37	214
13. Did respondents correctly follow all the skip patterns of the sections?	179	71
14. Were there any negative reactions from respondents to these steps?	31	224

The interviewers also indicated that many of the follow-ups were due to the coverage steps. However, this was to be expected because the coverage related steps were the only questions on the entire form which required mandatory follow-up. The report on evaluation of field collection procedures (Taller, 1994) indicated that many interviewers had difficulty with the concept of circling marked questions for mandatory follow-up. It was suggested that interviewers would have less trouble with this procedure if the basic "common sense" concept behind the reason for mandatory follow-up was explained in the training process.

Step 10 of the NCT form was a short questionnaire about the NCT itself. Respondents were asked to answer a few questions regarding the census test, but were not required to respond to this step. In the analysis of step 10, questions A, C and D were checked for comments about the coverage related steps with the following results:

Question A: Did you find any of the steps on pages 2 and 3 difficult to answer? (If yes, indicate which steps and why)

The reasons for difficulty with the steps are summarized in Table 3.

Out of 62 responses indicating difficulty with Step 2, there were 42 valid "yes" responses, and 20 which turned out to be "no problem" or errors.

Out of 68 responses indicating difficulty with step 4, there were only 5 valid "yes" responses and 63 cases of respondent errors. Most of the step 4 comments turned out to actually have been for question 46 (income) which respondents incorrectly listed in question A rather than question B. Since only one byte could be captured for this question, "4" was keyed but did not actually refer to step 4.

Out of 10 responses indicating difficulty with Step 6 there were only 3 valid "yes" responses and 7 "no problem" or error responses.

Question C: Did you use the Guide? (If yes, indicate for which steps)
Step 2 - 41 yes, 21 error responses
Step 4 - 2 yes, 19 error responses
Step 6 - 7 yes, 12 error responses

Question D: Was the guide helpful? (If no, indicate for which steps and why)
Step 2 - 1 problem with order of listing, 2 not clear, 1 problem with students, 9 error/no problem
Step 4 - all 7 were error responses
Step 6 - one indicated more information needed about temporary residents, 7 were error responses.

Table 3 Respondents' Step 10 Comments Regarding Coverage Related Steps

Step 10 Question and List of Reasons Given by Respondents	Step 2 (Roster)	Step 4 (FR Hhld)	Step 6 (TR Hhld)
A. Did you find any of the steps on pages 2 and 3 difficult to answer? (If yes was checked, the respondent was instructed to indicate the step number and the reason for the difficulty.)			
Not clear (but no errors apparent)	7	4	2
Uncertain about order of names (but no apparent errors)	6		
Problem with inclusion of students (errors apparent)	6		
Problem with inclusion of students (no apparent errors)	4		
Expressed wish for anonymity	6		
Joint Custody of children (no apparent errors)	4		
Adopted children (included)	2		
Difficulty if respondent was the only household member	3		
Annoyed by listing names twice (once in roster, again in question 1)	2		
Other (household in process of separation, brother living in camper in backyard, lodger in basement)	3		
No problem/error	20	63	7
Foreign student		1	-
Student household (incorrectly enumerated)			1
Total	62	68	10

Step 2 (1993) - Household Roster

Household Size:

Although the number of names on the roster was not data captured, the number of records per household, a derived variable, can reasonably be assumed to be correlated with household size and thus with the number of names on the roster. This derived variable can be used as a proxy variable for the number of names on the roster. Table 4 presents the cumulative weighted distribution of number of records per household for the NCT LFS sample and for comparison, the corresponding distribution for the 1991 Census (2B documents only). Note that the distributions are quite similar except for the tail (7+). There is not an obvious explanation for the discrepancy. It is noted that the tail area is based on a small number of observations (80) in the NCT. Also there was some indication that in a few cases (only 3 were detected for certain), multiple questionnaire households were not handled properly with the result that one larger household would actually be keyed as two smaller households. However, the number involved was not large enough to account for the discrepancy.

The number of records per household can be used to indicate those cases for which the numbers of records per household in phases 1 and 2 of the EFS differ. Investigation of those cases for which the counts differ in the two phases might shed some light on the respondent's understanding of the procedure to be followed in Step 2. The Edit Failure Study (EFS) sample was used to compare records per household between phases 1 and 2. It was found that there were 112 households (2.9 % of the EFS sample) for which the counts were different in the two phases. Table 5 presents a summary of the discovered reasons for the discrepancies, obtained from a representative sample of 70 of these households.

Names added to or removed from the roster and/or question 1 as a result of follow-up resulted in changes in household size in 1.3 % of households, the same as the observed percentage in the 1988 NCT (Royce, 1989). This follow-up occurred for several reasons, including edit failure as a result of mandatory follow-up of the coverage related steps. Other cases were followed-up as a result of the "rule of six". Out of all the cases in which the count changed as a result of follow-up, 16% were cases in which the respondent was not willing or able to complete the form, except possibly for the roster and coverage related steps. Such forms were mailed back blank from question 1 onward, so that only one record was keyed in phase 1. As a result of interviewer follow-up all members of these households were eventually enumerated and therefore the numbers of records per household keyed in phase 2 more accurately reflects the number of names on the roster in these cases.

The reasons for the remaining discrepancies between phase 1 and 2 counts can not be attributed to respondent behaviour. Keying errors accounted for changes in counts in 1.4% of households. These were cases in which an entire person column was missed in one of the phases, or in which an extra record was keyed for some reason. In 0.2 % of households the discrepancies were due to incorrect linkage between phases 1 and 2 as a result of errors in household IDs.

Table 4 Distributions of Numbers of Records per Household

Cumulative Distributions of Number of Records Per Household		
Number of Records Per Household	1993 NCT (Weighted LFS Sample)	1991 Census (2B Documents)
1	23.74	22.14
2	56.34	53.29
3	72.48	70.75
3	90.24	88.65
5	97.51	96.21
6	99.45	98.71
7	99.86	99.40
8+	100	100
Total	100%	100%

Table 5 Reasons for Which Household Counts Changed from Phase 1 to 2

Reason for Change in Count of Number of Records per Household from Phase 1 to 2	**Rate of Occurrence**
Names added or removed as a result of follow-up	1.3 %
Keying errors in Phase 1 or Phase 2	1.4 %
Linkage Errors	0.2 %
Total	2.9 %

Note:

There were a total of 112 households (2.9 % of the EFS sample) for which the numbers of records changed between phases 1 and 2. The results presented in the above table were estimated from a representative sample of 70 of these households.

There were several indications of respondent difficulty with Step 2. There were 27 calls to the Census Help Line enquiring about Step 2 (household roster). This represented the third largest number of enquiries about a specific question or step, after question 46 (income) with 159 calls and question 16 (ethnic ancestry) with 30 calls.

Also, analysis of the interviewer debriefing questionnaires (see Table 2 presented earlier) showed that 12.6% of interviewers reported that in general, respondents had difficulties distinguishing between the usual and temporary residents of their dwelling. In addition 22.9% of interviewers indicated that they had encountered situations in which either they or the respondent had doubts about including a person as a usual resident of the dwelling.

And as indicated earlier in Table 3, out of the Step 10 responses there were 42 cases in which respondents listed difficulty with the roster. The most common reason for difficulty concerned students (12 in total) while uncertainty about the order of names caused difficulty in 6 cases. The main negative reaction of respondents was about the obligation to give names in the household roster and question 1. Some individuals would have preferred the data to be anonymous (6), while 2 others were annoyed at having to write the names twice.

Evaluation of the NCT Roster Placement and Instructions

One reason for moving the household roster to the beginning of the coverage-related steps was to ensure that respondents would make their decisions about whom to include based on the instructions given with the roster. This was to keep entire households from incorrectly screening themselves out by misinterpreting the instructions of the TR or FR household steps.

A specific instruction was added under the "Include" heading to indicate that non-permanent residents should be included on the roster. It is difficult to assess whether or not the NCT coverage of non-permanent residents was improved relative to the 1991 coverage. NCT Report 15 (Badets, 1994) indicates that the NCT estimate of the proportion of NPRs is 0.6% as compared to 0.8% in the 1991 Census. However, a direct comparison of these two numbers does not allow us to evaluate any change in the quality of coverage. The actual population proportion of NPRs may have changed between 1991 and 1993 and an accurate estimate of the true proportion is not available for either year.

The instruction regarding children in joint custody situations appears to have been quite clear since all such situations indicated in steps 3 and 10 were handled correctly by the respondent. The analysis of step 3 (presented in the next section) shows, however, that respondents still had difficulty with students away at school and persons away in an institution in spite of the instructions regarding these cases.

There is some question about how effective the roster instructions were in preventing foreign and temporary residents from being listed on the roster and subsequently enumerated. As was explained in the "Overview of Changes Made for the 1993 NCT", a specific "Do not include" instruction was added to indicate that foreign residents should not be included on the roster. No specific instruction was given to indicate that temporary residents (with usual homes elsewhere) were not to be included on the roster. It was assumed that the list of instructions under the "Include" heading would be sufficient to show that such temporary residents should not be included. In order to assess these instructions, it is necessary to draw on the analyses of the other coverage-related steps, given in the sections for Steps 4 and 6. The pertinent results are presented here because they are directly related to the interpretation of the roster instructions.

It was found that in the LFS sample 38.5% of the legitimate FR households and 70.6% of the legitimate TR households listed names on the roster, contrary to the Step 2 instructions. Although these legitimate FR and TR households did follow the instructions to stop at steps 4 and 6 respectively, the fact that a substantial proportion of these respondents listed household members on the roster raises the question of how effective the instructions were in preventing FRs and TRs from being enumerated in partial-FR and partial-TR households. This is an important question because once the roster has been filled out, Steps 4 and 6 are the only points at which there is any indication that enumeration should not be completed for all members of the household and these steps serve only to exclude entire households. Households which are comprised entirely of FRs will be screened out at Step 4 even if they have entered names on the

roster, but there is no further instruction for partial-FR households. In the NCT there was no way to assess whether or not some FRs were inadvertently enumerated in partial-FR households. With regard to temporary residents, Step 5 does ask the respondent to give the number of TRs in the household but there is no reminder that these individuals are not to be enumerated on the form. It was found at follow-up that temporary residents had been incorrectly listed on the roster and enumerated by the respondent in 9.4% of the partial-TR households in the EFS sample.

Although the FR and TR households were not intended to list the household members in the roster, it turned out that having the names made follow-up easier for these households. This suggests the potential use of the roster as a follow-up tool for FR and TR households. However, this use is not compatible with the present function of the roster as a list of names which, at step 8, are to be copied into question 1 for enumeration.

The Order of Listing Instructions

The "order of listing" instructions can be assessed indirectly by determining the number of times in which the respondent did not list household members in the desired order (ie. with the spouse of person 1 listed as person 2, rather than as person 3, 4, 5, 6 or higher). It was found that there were only 21 cases out of 12447 households in the LFS file and 10 cases out of 2911 households in the special populations files in which the "spouse" (common-law or legally married) of person 1 was listed as a person number other than 2.

However, even with the simplified version of the order of listing instructions, some respondents still had difficulty with this procedure. The Cognitive Research (Statistics Canada, 1994), the interviewer debriefing and the analysis of Step 10 all reflected this difficulty. There was some confusion about the order of persons in households not following the father-mother-children model, and many respondents had difficulty deciding who Person 1 should be. There were cases in which respondents forgot to include themselves. The "Don't Forget to Include Yourself!" note was acknowledged to be important and it was found that the instructions "Begin the list with..." were not always read or understood. The cognitive research showed that some respondents found the instructions awkward and some suggested that the wording be simplified by using words commonly used in everyday, spoken English. For example, it was suggested that "other persons" be changed to "other people". It was also suggested that the instruction should be in bold face print.

Overall Assessment of the Instructions

It was apparent in examination of the questionnaires that some respondents had read the instructions carefully. It was sometimes noted that portions of the instructions had been underlined, indicating that the respondent had certainly paid attention to them. The qualitative studies showed, however, that most respondents don't read detailed instructions unless they feel

they have to. In some cases, respondents may simply be more aware that certain persons in their household are not to be enumerated and will look for specific instructions regarding these individuals. Some respondents involved in the cognitive research commented that they would have preferred to have read the instructions before printing the list of household members. Also, a consultant suggested putting the "include" list before the roster (NCT Report 3). However, at the time it was felt that this would make more reading for those individuals who do not need the list. The respondents who do read the instructions rely on the bold highlighting for guidance. There was some indication that the placement of the instructions below the roster, and the size and colour of the headings made them less visible to the respondent.

Step 3 (1993) - Persons Left Out

Although the qualitative studies showed that the roster was generally well done by respondents, they also indicated considerable uncertainty regarding the inclusion/exclusion of certain types of individuals. There were some comments about the instruction in Step 2 to include unmarried sons/daughters who are students. Some respondents had university student children that no longer lived with them, and they thought that to include the students in the household with the parents was odd. Sometimes young children were forgotten, possibly due to confusion with enumeration for elections.

Step 3, "Persons Left Out", gives the respondent the opportunity to indicate any persons which were not included in the roster for some reason. The analysis of Step 3 helps to quantify the respondents' uncertainty. Table 6-a presents the response distribution for phase 1 of the EFS sample, and for comparison the corresponding results from the 1991 ESS, the 1988 Response Rate Sample Study (RRSS), and the 1986 ESS. The 1993 rate of "yes" response was 1.3 %, very close to the historical data. This indicates that the percentage of respondents having doubt remains fairly constant across all these studies.

Follow-up for Non-Response

The phase 1 non-response rate was 15.38% which was reduced to 3.71% in the phase 2 EFS sample. Of 592 non-responses at phase 1, only 5 were keyed as "yes" responses at phase 2 and of these only 2 resulted in the enumeration of additional persons at follow-up. The majority of non-response follow-ups resulted in "no" responses as reflected by the phase 2 "no" response rate of 94.91%. This supports the observation of the interviewer debriefing and cognitive research that most cases of non-response to step 3 are due to respondents simply not answering a question which seems non-applicable to them. It appears that the change in the edit and follow-up rule to non-mandatory status was appropriate for non-response to this step.

Table 6-a Step 3 (Persons Left Out), Edit Failure Study Sample

Rates of Response for "Persons Left Out" (Step 3 in 1993)	1993 NCT EFS	1991 Census ESS (2B Forms)	1988 NCT RRSS	1986 Census ESS
Non-response	15.38	24.4	7.9	25.5
"NO" response	83.32	74.4	90.8	73.5
"YES" response	1.30	1.2	1.1	1.1
n = sample size	n = 3850	n = 2893		

Note:

1) In all four cases above, the results are taken from the first phase of the study, before any interviewer follow-up has been completed. Therefore, the results are a measurement of respondent behaviour.

2) EFS = "Edit Failure Study", ESS = "Edit Sample Study" and RRSS = "Response Rate Sample Study".

3) The results in the four columns are not directly comparable to each other for the following reasons:

The NCT is carried out in a different manner from the Census, and although the NCT sample may be expected to be representative of the population of Canada in terms of certain household and respondent characteristics, the respondent behaviour of NCT respondents may not be representative of the population in general, both because of the way in which the sample is chosen, and because the sampling environment is not that of the Census.

Although the two NCT samples (1993 and 1988) may be more comparable to each other than to the Census results, it is important to note that the roster instructions were not only different between the two years, but that the underlying concepts differed. In 1988, the respondent was expected to include Foreign and Temporary Residents on the Roster while in 1993, the instructions were intended to exclude those individuals from the Roster. Therefore, although this step may indicate the level of respondent understanding of the Roster instructions, the rates are in effect measuring the respondent's ability to understand and carry out two different tasks.

The NCT Step 3 response distributions are presented in Table 6-b. The LFS sample contained 134 "yes" responses while the special populations sample contained 38.

Table 6-b Step 3 (Persons Left Out), NCT LFS and Special Populations Samples

Rates of Response for "Persons Left Out" (Step 3 in 1993)	1993 NCT (LFS Sample)	1993 NCT (Spec. Pop.) Sample	1991 Census
Non-response	2.96 %	3.2 %	
"NO" response	95.95 %	95.47 %	
"YES" response	1.08 %	1.31 %	1.26 %
n = sample size	n = 12447	n = 2911	n = 10019606

A representative sample of these questionnaires was examined, with the results presented in Table 6-c and Table 6-d. The most common reasons listed in step 3 concerned students away at school and persons with a usual residence elsewhere.

In the presentation of the following rates, the keying errors have been removed from the sample sizes so that the results will more accurately reflect respondent and interviewer behaviour. In the LFS sample presented in Table 6-c, 18.4% of the "yes" responses resulted in persons being correctly added to the forms, while 17.1% were cases in which individuals should have been enumerated but were not. Only 3.95% of the "yes" responses resulted in the interviewer incorrectly enumerating persons who should not have been included. The remaining 59.2% were cases in which the persons listed in step 3 should not have been enumerated and in fact were not. These were situations in which the respondent correctly left individuals out of the household roster, but was not certain that this was the correct procedure. A large number of these were cases where a family member or former household member had moved out recently and it was not clear to the respondent whether or not that person should be enumerated as part of the household.

The corresponding results for the special population samples are given in Table 6-d. Only 7.4% of these "yes" responses resulted in persons being correctly enumerated, while in 14.8%, individuals should have been added but were not. No errors were made in enumerating persons who should not have been included. Again, the majority (74.1%) of "yes" responses listed persons who should not have been included and were not added.

One notable feature of this analysis is that the interviewers were extremely careful not to add persons to the roster unless they were certain that they should be added, as reflected by the low rates of incorrect additions. However, the result of this prudence is that several persons who

should have been enumerated were not added by the interviewers. Because undercoverage is an important issue in the Census, this situation underlines the need for better interviewer training about the situations in which persons should be added to the roster and enumerated.

Table 6-c Reasons Given for Listing Persons in Step 3 (LFS Sample)

Reason given in Step 3	# Quest. (total persons in brackets)	Enumerated		Not Enumerated	
		Correct	Error	Correct	Error
Student Away at School	15 (15)	6 (6)		1 (1)	9 (9)
Non-student child who has moved out	7 (9)			6 (8)	1 (1)
Separated Spouse	2 (2)			2 (2)	
Child in Joint Custody	7 (8)			7 (8)	
Foster Child	2 (3)	2 (3)			
Different Residence while at work	1 (1)				1 (1)
Institution	6 (6)			6 (6)	
Has usual residence elsewhere	15 (18)		2 (2)	13 (16)	
Will be moving out soon/ looking for new home	5 (12)	3 (7)			2 (5)
Has recently moved out	2 (2)			2 (2)	
Lodger / Boarder / Exchange Student	6 (6)			6 (8)	
Separate Apt. in Same House	2 (2)		1 (1)	1 (1)	
Other/ No reason given	5 (6)	4 (5)		1 (1)	
Names on another Questionnaire	1				
Keying Error, or Checked but Blank	13				
Total	89 (93)	14 (20)	3 (3)	45 (53)	13 (16)

Table 6-d Reasons Given for Listing Persons in Step 3 (Special Population Samples)

Reason given in Step 3	# Quest. (Total persons in brackets)	Enumerated		Not Enumerated	
		Correct	Error	Correct	Error
Student Away at School	2 (2)				2 (2)
Non-student child who has moved out					
Separated Spouse	1 (1)			3 (3)	
Child in Joint Custody	1 (1)			1 (1)	
Foster Child	1 (1)	1 (1)			
Different Residence while at work	1 (1)				1 (1)
Institution	2 (2)			2 (2)	
Has usual residence elsewhere	8 (14)			8 (14)	
Will be moving out soon/ looking for new home	2 (2)	1 (1)			1 (1)
Has recently moved out	2 (2)			2 (2)	
Lodger / Boarder / Exchange Student	2 (2)			2 (2)	
Separate Apt. in Same House					
Other/ No reason given	2 (2)			2 (2)	
Names on another Questionnaire	1				
Keying Error, or Checked but Blank	9				
Total	36 (32)	2 (2)		20 (26)	4 (4)

Step 4 (1993) - Foreign Resident Household

The step 4 response distribution for phase 1 of the EFS is given in Table 7-a, with the 1991 ESS results for comparison. A total of 26 questionnaires (0.68 % of the EFS sample) were keyed as FR households in phase 1, but examination of the questionnaires revealed that of these, only 4 were possible/confirmed FR households. A household was considered to be confirmed as a FR household if there was an indication on the form that the interviewer had followed up and that it was indeed a valid response. For the purposes of this study, if a questionnaire had been completed "correctly" as a FR household, but there was no sign of follow-up it was considered to be a possible FR household. The remaining cases were the result of respondent error (21 cases) and keying error (1 case). Compared to 1991, the rate of possible/confirmed FR households is slightly lower, while the rate of respondent error has doubled.

Table 7-b presents the breakdown of the forms keyed as FR households into their actual status, along with an indication of whether or not the form had been completed from question 1 onwards. It is informative to note that in all 4 cases which were possible/confirmed, the respondent correctly left the rest of the form blank, while of the 21 cases of respondent error, 19 questionnaires were completed. This suggests that the respondent errors were due to carelessness in not reading the coverage steps carefully, since the instructions in step 4 clearly indicated that Foreign Resident households should not be enumerated.

Inconsistent Answer Format

Respondents expressed a need for "yes" and "no" answer categories for this step. They noted the inconsistency in the answer format for this step as compared to step 3. This was echoed in the interviewer debriefings and in the findings of the cognitive research as well as in the increased rate of respondent error to this step as compared to the 1991 ESS.

Table 7-a Step 4 (Foreign Resident Household), Edit Failure Study Results

Type of Response to Step 4, Foreign Resident Household		Response Rate	
		1993 NCT EFS	1991 Census ESS (2B Forms)
Non-Response		99.32 %	99.62 %
Checked	Possible/Confirmed	0.10 %	0.14 %
	Respondent Error	0.55 %	0.24 %
	Keying Error	0.03 %	not available
Total Sample Size (n)		n = 3850	n = 2893

Table 7-b Actual Status of EFS Questionnaires Keyed as FR Households

Actual Status of 1993 EFS Questionnaires keyed as Foreign Resident Households in Phase 1 of the EFS	Percent of Forms which were Keyed as FR Households in Phase 1	Percentage Which did not Complete the Form
Confirmed FR Household	9.1 %	100 %
Possible FR HHLD, but not followed up	4.5 %	100 %
Respondent Error	77.3 %	9.1 %
Interviewer Error	n/a	
Can't tell whose error	n/a	
Keying/Linkage error	9.1 %	n/a
Total	100 % (n = 26)	

The NCT response distributions for Step 4 are given in Table 7-c, along with the 1991 Census results for comparison.

Table 7-c Step 4, Foreign Resident Household, NCT Results

Type of Response to Step 4, Foreign Resident Household		Rate of Response		
		1993 NCT (LFS Sample)	1993 NCT (Spec. Pop. Sample)	1991 Census
Non-Response		99.26 %	98.63 %	
Checked	Possible/Confirmed	.133 %	.069 %	.177 %
	Error	.606 %	1.31 %	
Total Sample Size (n)		n = 12447	n = 2911	n = 10019606

Table 7-d gives the breakdown into actual status for both the LFS and the special population samples. A representative sample of 72 of the 92 questionnaires which were keyed as FR households at phase 2 were examined for the LFS sample, while all of the 40 for the special population samples were examined. Again, the possible/confirmed FR households made up only a small proportion of those keyed as FR households (18.1% in the LFS and 5% in the special populations). And, the same pattern of questionnaire completion was noted for legitimate FR households. All of the possible/confirmed FR household questionnaires were blank from question 1 onwards while incorrectly classified FR household questionnaires were almost all completed. A notable proportion of the errors were determined to be as the result of interviewers incorrectly checking step 4 during follow-up. The rate of respondent error reported in Table 7-d will be underestimated, because interviewers were sometimes observed to change the respondent's response to this step at follow-up, even though the NCT rules for edit and follow-up did not indicate that this should be done.

Some of the respondent errors may have been due to misunderstanding of the intent of the step, possibly due to hasty reading. The interviewer debriefing reports listed particular reasons for respondent misunderstanding as follows: a member of the Canadian Armed Forces who thought he did not have to answer the questionnaire (he read only the first part of the question) and a few households of foreign students who marked this question after reading "residents of another country visiting Canada temporarily." And as noted in Table 7-d, respondent errors detected by looking at the questionnaires included university students from Trinidad and Antigua, a person who works for Canada's National Defense, individuals with Oriental surnames, full time students from Taiwan with student permits, an American student here for 5 months and senior respondents.

Table 7-d Actual Status of Questionnaires Keyed as FR Households

Actual Status of 1993 NCT Questionnaires With "Yes" for Step 4, Foreign Resident Household	LFS Sample		Special Pops.	
	% of Checked	% Blank	% of Checked	% Blank
Confirmed FR Household	15.3 %	100 %	-	-
Possible FR HHLD, but not followed up	2.8 %	100 %	5 %	100 %
Respondent Error	27.8 %	10 %	40 %	6.25 %
Interviewer Error	40.3 %	0 %	12.5 %	0 %
Can't tell whose error	4.2 %	0 %	-	-
Keying/Linkage error	9.7 %	-	42.5%	-
Total	100 % (n=72)	n/a	100 % (n=40)	n/a

Note that there were 92 forms keyed as FR households in the LFS, of which a representative sample of 72 were examined for this study. In the special populations sample, 40 forms were keyed as FR households, all of which were examined.

Note these respondent errors of interest:

LFS Sample:
- university students from Trinidad and Antigua
- person who works for Canada's National Defense
- individuals with Oriental surnames
- senior respondents

Special Populations Sample:
- full time students from Taiwan with student permits
- American student here for 5 months (in step 4 he underlined the instruction "residents of another Country ..."
- seniors
- "mental problem" (interviewer's note)

Effectiveness of Roster Instructions Regarding Foreign Residents

Although the true FR household respondents were observed to follow the stopping instruction correctly in every case, another aspect of the analysis suggests that some may not have read the roster instructions carefully. It was noted that out of the 13 possible/confirmed FR households in the sample there were 5 cases (38.5%) in which household members were listed in the roster, even though the instructions indicated that they should not be. This raises the question of how effective the roster instructions were in preventing FR's from being enumerated in households which also contained some non-FR's. The reason that this is a problem is that once the roster has been filled out, Steps 4 and 6 are the only points at which there is any indication that enumeration should not be completed for all members of the household. Thus households which are comprised entirely of FRs will be screened out even if they have entered names on the roster, but there is no further instruction for households only partially comprised of FRs.

Step 6 (1993) - Temporary Resident Household

The step 6 response distribution for phase 1 of the EFS is given in Table 8-a, along with the 1991 ESS 2B results for comparison. There were 33 cases (0.86% of households) in which households were keyed as temporary resident households, but of these only 8 were determined to be possible/confirmed TR households while 23 were due to respondent error and 2 were due to keying errors. The rates of possible/confirmed TR households and respondent errors are observed to be very similar to those of the 1991 ESS results. The distribution of the actual status of these households is also given in Table 8-b which shows that the instruction to not complete the questionnaire was only followed correctly by the possible/confirmed TR households as indicated by the "percent blank" column.

The NCT sample response distribution for step 6 is given in Table 8-c along with 1991 Census results for comparison. A representative sample of 87 of the 105 questionnaires keyed as TR households at phase 2 were examined for the LFS sample, while all 25 for the special population samples were examined. It is shown in Table 8-d that of these, only 39% (LFS) and 8% (special populations) were determined to be possible/confirmed TR households. Respondent and interviewer errors contributed significantly to the observed response rates and again it is observed that the instruction to not complete the questionnaire was only followed correctly by the legitimate TR households.

The cognitive research indicated that although most respondents were to skip Step 6, those that read it anyway expressed a need for "yes" and "no" categories, for the same reasons as were indicated for step 4. That is, respondents prefer a consistent pattern of response category.

Effectiveness of Roster Instructions Regarding Temporary Residents

Again, as was observed for step 4, there is a strong indication that these respondents did not read the roster instructions carefully. Although the true TR household respondents were observed to follow the stopping instruction correctly in almost every case, another aspect of the analysis suggests that some may not have read the roster instructions carefully. It was noted that out of the 34 possible/confirmed TR households in the LFS sample there were 24 cases (70.6%) in which household members were listed in the roster, even though the instructions indicated that they should not be. This raises the question of how effective the roster instructions were in preventing TR's from being enumerated in partial-TR households. It is possible to assess this issue by looking at the behaviour of partial-TR households in the EFS sample. Step 5 asks the respondent to give the number of TRs in the household (but there is no reminder that these individuals are not to be enumerated on the form). In phase 1 of the EFS, 53 partial-TR households reported temporary residents in Step 5. As a result of follow-up to this step, it was found that in 5 cases (9.4% of the partial-TR households) the temporary residents had been incorrectly listed on the roster and enumerated by the respondent.

Table 8-a Step 6, Temporary Resident Household, EFS Results

Type of Response to Step 6, Temporary Resident Household		Response Rate	
		1993 NCT EFS	1991 Census ESS (2B Forms)
Non-Response		99.14 %	99.24 %
Checked	Possible/Confirmed	0.21 %	0.24 %
	Respondent Error	0.60 %	0.52 %
	Keying Error	0.05 %	not available
Total Sample Size (n)		n = 3850	n = 2893

Table 8-b Actual Status of EFS Questionnaires Keyed as TR Households

Actual Status of 1993 EFS Questionnaires keyed as Temporary Resident Households in Phase 1 of the EFS	Percent of Checked	Percent Blank
Confirmed TR Household	15.2 %	100 %
Possible TR HHLD, but not followed up	9.1 %	66 %
Respondent Error	69.7 %	0 %
Interviewer Error	n/a	
Can't tell whose error	n/a	
Keying/Linkage error	6.1 %	-
Total	100 % (n=33)	n/a

Table 8-c Step 6, Temporary Resident Household, NCT Results

Type of Response to Step 6, Temporary Resident Household		Rate of Response		
		1993 NCT (LFS Sample)	1993 NCT (Spec. Pop. Sample)	1991 Census
Non-Response		99.16 %	99.14 %	
Checked	Possible/Confirmed	.262 %	.069 %	.437 %
	Error	.582 %	.79 %	
Total Sample Size (n)		n = 12447	n = 2911	n = 10019606

Table 8-d Actual Status of Questionnaires Keyed as TR Households

Actual Status of 1993 NCT Questionnaires With "Yes" for Step 6, Temporary Resident Household	LFS Sample		Special Pops.	
	% of Checked	% Blank	% of Checked	% Blank
Confirmed TR Household	31.0 %	100 %	8 %	50 %
Possible TR HHLD, but not followed up	8.0 %	100 %	-	-
Respondent Error	35.6 %	0 %	44 %	0 %
Interviewer Error	16.1 %	0 %	48 %	0 %
Can't tell whose error	4.6 %	0 %	-	-
Keying/Linkage error	4.6 %	-	-	-
Total	100 % (n=87)	n/a	100 % (n=25)	n/a

Note that there were 105 forms keyed as TR households in the LFS, of which a representative sample of 87 were examined for this study. In the special populations sample, 25 forms were keyed as TR households, all of which were examined.

Note these respondent errors of interest:

LFS Sample:

- respondent operates a hotel, entered "79" for temporary residents, but 3 family members were enumerated

Special Populations Sample:

- household will soon be moving

Step 8 (1993) - Turn the page and copy the names from Step 2 ...

The interview debriefing reports indicated that few people read the note about households of more than six persons and that there were problems when this case arose. People often didn't see the note. Sometimes people did see it but misinterpreted the instructions. For example, it was observed that one individual actually recorded all the questionnaire information for persons 7 and 8 in the comments section on the back of the first questionnaire.

The cognitive research indicated that respondents didn't have problems with step 8, but that most respondents did not see the "**Note:** If there are **more than six persons...**" . Mainly it was not seen because individuals immediately turned the page when they began reading Step 8 "**Turn the Page...**". Some people said that they stopped reading when they briefly saw the bold "**more than six**" since it did not apply to them. Some respondents felt the instruction at Step 8 was not necessary as they could "figure out for themselves to turn the page!" and that it would be more helpful to see the Step 8 symbol as question 1 (Statistics Canada, 1994).

Summary of the Evaluation of Steps 2, 3, 4, 6 and 8

The analysis of the coverage related steps shows that the level of respondent understanding of the instructions about whom to include is comparable to previous studies, as indicated by the rate of "yes" response to step 3. The rates of confirmed FR and TR households, and the distribution of household size are comparable to the 1991 Census results. However, there is a fairly strong indication that the rate of respondent error in checking the FR household step has increased in comparison to the 1991 ESS. This may be due to the respondent's tendency to respond to each question, even if it is not applicable for the household. This was also mentioned in some of the qualitative studies which indicated that respondents would prefer "yes" and "no" answer categories for steps 4 and 6.

The simplified instructions for the order of listing household members seem to have been adequate as reflected by the small number of households for which the spouse of person 1 was listed as someone other that person 2. However, there was some indication from the qualitative studies that respondents still had difficulty in deciding the order of listing. This indicates that although the wording of the instruction was shortened and simplified, the respondent burden may have only been reduced in the amount of material to read, and not in the understanding of the concept. Perhaps it is possible to clarify the instructions further.

The new version of roster instructions may have had a positive influence on the enumeration of non-permanent residents but it is not possible to assess this accurately.

It is not clear that the roster instruction to exclude foreign residents was visible enough, as reflected by the 38.5% of legitimate FR households which listed names on the roster. Also the implied instruction to exclude temporary residents from the roster was not understood or followed by 70.6% of legitimate temporary resident households which listed names on the roster. And 9.4% of the EFS partial-TR households were observed to incorrectly enter TRs on the roster and enumerate them. In addition, there were indications that the instructions regarding other specific situations (such as students away at school and persons away in institutions) did not help the respondents resolve their uncertainty. It is possible that the roster instructions may not have been visible enough, due to their location below the roster and the size and depth of colour of the headings.

The qualitative studies showed that the step 8 instruction for households with more than 6 persons was sometimes missed or misinterpreted.

There are several indications that errors were caused by interviewers. These include failure to enumerate eligible persons listed in step 3, failure to follow-up responses to steps 4 and 6, and in a significant number of cases mistakenly checking steps 4 and 6 when completing questionnaires in follow-up interviews. NCT Report No. 6 (Anne Taller, 1994) indicated that many interviewers had difficulty with the concept of circling marked questions for mandatory follow-up. It was suggested that interviewers would have less trouble with this procedure if the

basic "common sense" concept behind the reason for mandatory follow-up was explained in the training process.

V. Instruction pour terminer les questions pour les personnes de moins de 15 ans.

Le questionnaire long du recensement (formule 2B) est constitué de deux parties: d'abord les questions qui concernent tous les membres du ménage (relation à la personne 1, âge, sexe, langue, citoyenneté, origines ethniques, etc.) puis les questions qui se rapportent à ceux qui sont âgés de 15 ans ou plus (travail, revenu, etc.). Ces deux parties sont séparées par une instruction qui met fin au remplissage du questionnaire pour les membres du ménage qui ont moins de 15 ans.

ÉTAPE 9	**Répondez aux questions 21 à 46 pour chaque personne âgée de 15 ans et plus.**

Au recensement de 1986, cette instruction placée entre la question 20 sur les limitations d'activités et la question 21 sur l'éducation.

> Si vous êtes né(e) le ou après le 3 juin 1971, cochez ici ☐ et ne répondez pas aux questions 21 à 32 ... FIN DU QUESTIONNAIRE POUR CETTE PERSONNE
>
> Si vous êtes né(e) avant le 3 juin 1971, cochez ici ☐ et continuez avec les questions 21 à 32.

Il faut noter qu'en 1986, le questionnaire long du recensement était constitué d'une structure "matricielle" pour les sept premières questions (contenu du questionnnaire du questionnaire 2A) alors que les autres questions personnelles étaient regroupées par personne une à la suite de l'autre. Avec ce format, le taux de réponse pour les personnes de moins de 15 ans à au moins une des questions suivant la question filtre était de 6.14%.

Au recensement de 1991, alors que toutes les questions personnelles (Question 1 à 45) étaient présentées sous forme matricielle, l'instruction (Étape 10: Répondez aux questions 20 à 45 pour chaque personne âgée de 15 ans et plus) traversait les pages 10 et 11 entre les questions 19 sur les incapacités à long terme et la question 20 sur la mobilité. Dans ce cas, le taux de réponse pour les personnes de moins de 15 ans à au moins une des questions suivant la question filtre était de 49.17%. Un format similaire fut utilisé pour le Test national du recensement de 1993 et le taux d'erreur à l'aiguillage a été de 54.2%.

Les études qualitatives effectuées à l'occasion du Test national du recensement ont montré quelques causes à ces erreurs. La principale est un manque de visibilité de l'instruction qui est placée sur fond blanc (contrairement aux autres questions et instructions) en haut de la page. On a aussi constaté que les répondants remplissent le questionnaire en suivant les questions numéro par numéro. Dans ce cas, ils vont immédiatement à 21 après avoir rempli la question 20 de la page précédente. Une autre source d'erreur est de ne donner qu'une seule instruction pour toutes les colonnes. Puisque les premières personnes inscrites pour le ménage sont souvent des adultes, le répondant aurait tendance à oublier cette instruction une fois parvenu aux colonnes réservées aux enfants du ménage. Notons que même si le répondant prend connaissance de l'instruction d'aiguillage, le remplissage du questionnaire peut être ardu s'il s'agit d'un ménage où il y a plusieurs personnes et que les enfants ne sont pas tous placés à la fin. Globalement, il est à remarquer que ces observations s'accordent avec les différences observées entre les taux d'erreur à la question filtre et le changement survenu entre le format du questionnaire de 1986 et celui des questionnaires de 1991 et 1993.

Même si ces erreurs ne causent pas directement des erreurs de réponse (il n'y a que des réponses inutiles pour les enfants), la frustration générée chez les répondants dû au fait de répondre à plusieurs questions non pertinentes (surtout pour les ménages avec de nombreux enfants) n'est pas à négliger parce qu'elle a un impact sur la qualité des réponses aux questions 21 et plus pour les membres adultes du ménage et un effet négatif sur la perception du recensement et la volonté générale de répondre ou non. L'autre impact négatif sur le recensement est une augmentation substantielle des coûts de saisie des questionnaires. En effet, les représentants du recensement ont pour instruction de ne pas effacer les réponses en trop à la suite d'un aiguillage erroné et, par la suite, le programme de saisie des données ne calque pas la structure d'aiguillage du questionnaire et permet donc la saisie de toutes les informations fournies par le répondant.

Il est donc nécessaire de remédier à cette situation et la différence très marquée entre le taux de 1986 et les taux de 1991 et 1993 suggère comme solution un retour à un format similaire à celui utilisé au recensement de 1986. Cependant, une adaptation est nécessaire puisque la forme matricielle doit être conservée pour toutes les questions personnelles. La solution la plus naturelle est d'ajouter une question filtre similaire à celle de 1986 à la place de l'étape-instruction actuelle. Cette question serait imprimée sur le même fond que les autres questions, serait précédée d'un numéro et aurait une structure de réponse colonne par colonne.

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Appendix A - 1991 Census Coverage Related Steps

STEP 2

How to complete this questionnaire

To answer the questions:

Mark a circle ..... ⊗

OR Enter a number in a box 09

OR Print in a box ..... FAMILY NAME

If you require help with any of the questions, use the Guide **OR** call us free of charge. The numbers to call are on page 28.

STEP 3

If **all** persons in this household are **foreign residents** (see below), mark here ..... ○
and do **not** complete this questionnaire.

Mail it in the enclosed postage-paid envelope.

Foreign residents are:

- government representatives of another country attached to the embassy, high commission or other diplomatic body of that country in Canada, and their families;
- members of the Armed Forces of another country who are stationed in Canada, and their families;
- residents of another country visiting in Canada temporarily.

STEP 4

If **all** persons in this household are staying here temporarily **and** have a usual home somewhere else in Canada, enter the total number of persons in this box ..... ☐
and do **not** complete this questionnaire.

Mail it in the enclosed postage-paid envelope.

STEP 5

List below all persons who usually live here as of Tuesday, June 4, 1991.

(Please see Guide for special situations.)

BEGIN THE LIST WITH:

- either the husband, wife or common-law partner of a couple living here; or
- the parent, where one parent lives with his/her never-married son(s) or daughter(s).

If neither of the above applies, begin with any adult living here.

CONTINUE THE LIST WITH:

- the wife, husband or common-law partner of Person 1;
- never-married children of Person 1 (including adopted and stepchildren);
- other relatives of Person 1 and members of their families, if living here;
- persons not related to Person 1 and members of their families, if living here.

BE SURE TO INCLUDE:

- children, relatives, room-mates, boarders and live-in employees;
- anyone temporarily away on June 4, including students away at scho or a husband, wife or others working away from home;
- anyone who stayed here overnight between June 3 and June 4, w has no usual home somewhere else;
- anyone who is now in an institution, such as a hospital, a hor for the aged or a prison, but only if that person was admitted af **December 4, 1990.**

Don't forget to include yourself!

	Family name	Given name	Initi
Person 1			
Person 2			
Person 3			
Person 4			
Person 5			
Person 6			
Person 7			
Person 8			
Person 9			
Person 10			

If you need more space, use the Comments section on page 28

STEP 6

Did you leave anyone out of Step 5 because you were not sure the person should be listed?

For example: other relatives living here; a student away at school; a lodger who also has another home; live-in help; or a member of this household who is away in an institution.

○ No

01 ○ Yes — Print the name of each person left out and the reason.

Name	
Reason	

Name	
Reason	

Name	
Reason	

If you need more space, use the "Comments" section on page 28.

STEP 7

How many persons who have a usual home somewhere else in Canada stayed here overnight between June 3 and 4, 1991?

○ None

OR

02 ☐ ◄ Number of persons

STEP 8

Does anyone in this household OPERATE a farm, ranch or other agricultural holding?

Other agricultural holdings include, for example: feedlots; greenhouses; mushroom houses; nurseries; fur farms; and beekeeping, sod, berry and maple syrup operations.

03 ○ No

04 ○ Yes

STEP 9

Turn the page and copy the names from Step 5 into the spaces across the top of the page.

Then continue with the questionnaire.

Note:

If there are **more than six persons** in this household, enter the first six on this questionnaire and continue on a second questionnaire. If you do not have a second questionnaire, note this in the "Comments" section on page 28. A census representative will contact you.

Appendix B - 1993 NCT Coverage Related Steps

P 2

List below all persons who usually live here as of November 8, 1993, even if they are temporarily away on business, at school or on vacation.

Begin the list with an adult as Person 1 followed, if applicable, by that person's spouse or unmarried partner as Person 2.

Continue the list with other persons who usually live here.

Don't forget to include yourself!

	Family name	Given name	Initial
Person 1			
Person 2			
Person 3			
Person 4			
Person 5			
Person 6			
Person 7			
Person 8			
Person 9			
Person 10			

If you need more space, use the "Comments" section on page 32.

Include

- Everyone who usually lives here, including family members, room-mates, boarders and live-in employees;
- **Unmarried sons or daughters who are students,** even if they live somewhere else while attending school;
- **Children in joint custody situations** who live here most of the time (if such children spend equal time elsewhere, include children living here on November 8, 1993);
- Persons from another country who are **student or employment authorization holders, refugee claimants or Minister's permit holders, and their families;**
- Persons who usually live here but are now in an **institution** (such as a hospital or a correctional centre), if they have been there **less than six months;**
- Persons who stayed here on November 8, 1993, who have **no usual home elsewhere.**

Do not include

- **Persons who are visiting Canada temporarily or persons who are government representatives of another country, or members of the Armed Forces of another country stationed in Canada, and their families.**

If you need help, please use the Guide or call us toll free at **1-800-565-5595.**

STEP 3

Did you leave anyone out of Step 2 because you were not sure the person should be listed?

For example: other relatives living here; a student away at school; a lodger who also has another home; live-in help; or a member of this household who is away in an institution.

1 ◯ No

2 ◯ Yes — Print the name of each person left out and the reason.

Name	Reason
Name	Reason
Name	Reason

If you need more space, use the "Comments" section on page 32.

STEP 4

If **ALL** persons in this household are:

- **government representatives of another country attached to the embassy, high commission or other diplomatic body of that country in Canada,** and their families; or
- **members of the Armed Forces of another country who are stationed in Canada,** and their families; or
- **residents of another country visiting Canada temporarily,**

then mark this circle 3 ◯

and do not complete this questionnaire. Mail it in the enclosed postage-paid envelope.

STEP 5

How many persons who have a usual home somewhere else in Canada are staying here temporarily as of November 8, 1993?

4 ◯ None — **Go to Step 7** **OR** ☐ ◀ Number of persons

STEP 6

If **ALL** persons in this household are **staying here temporarily and have a usual home somewhere else in Canada,**

then mark this circle 5 ◯

and do not complete this questionnaire. Mail it in the enclosed postage-paid envelope.

STEP 7

Does anyone in this household OPERATE an agricultural holding?

Agricultural holdings include: ranches, farms, feedlots, hobby farms, greenhouses, mushroom houses, nurseries, fur farms, horse farms; beekeeping, sod, fruit and maple syrup operations, etc.

6 ◯ No

7 ◯ Yes

STEP 8

Turn the page and copy the names from Step 2 into the spaces across the top of the page.

Then continue with the questionnaire.

Note:
If there are **more than six persons** in this household, enter the first six on this questionnaire and continue on a second questionnaire. If you do not have a second questionnaire, note this in the "Comments" section on page 32. A Statistics Canada representative will contact you.

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